



During the course of a day, you will often find yourself looking things up in Point of Sale.

Most often, you will have to look up a customer's account and find a specific item for them.

In this course, we will explore the various options available to locate this data at the POS terminal.

Methods will include:

- Barcode Scanning
- Manual SKU Entry
- Smart Lookup
- Item Description Lookup and
- the QuickFind grid

We will begin by launching Point of Sale.

To begin a transaction for a specific account, place the cursor in the Customer field.

If your customer knows their account number, you simply type it here and press Enter.

If the customer does not know their account number you can look it up using their name or their telephone number.

With the cursor in the customer field, start typing the customer's name.

If this is an individual's account, you would begin with their last name.

For example, to locate Terry O. Dunn we would search for 'Dunn'.

The 'Sort Name' field in MCR determines how an account is searched within Point of Sale.

In this instance we are looking up a business account, so we will type the business name: Best Plumbing.



The customer list opens, and, as you type each letter, the names in the list change.

When you find the name, you can use the up and down arrows to highlight it , click on it with the mouse, or continue typing until the name is highlighted.

Now press Enter.

Some customers have arranged to have their billing broken down by a particular project or location.

When this is the case, a list of Job Accounts opens automatically.

Ask your customer which Job Account this purchase should be charged to, and select it.

A customer information box may display depending on how your Point of Sale Options are configured.

If it does, check to make sure you have the correct account.

Press 'Enter' if this is the customer you're working with, or 'Cancel' to continue the search.

Once the customer has been selected, you are ready to post items to the transaction.

If your Eagle Point of Sale station has an attached barcode scanner, the easiest way to do this is with Barcode Scanning.

Just make sure your cursor is in the Item field, then scan the UPC code.

Typically, scanning an item enters a quantity of one.

If a customer is buying more than one of the same item, Best Practice is to scan each and every item as it goes through the register.

Some items, like lumber, do not usually have a UPC barcode on them.

For these types of items, the easiest way to post the item is to place your cursor in the Item field and Type in the SKU.



Tab over and enter the quantity, then press the Enter key.

Using the Smart Lookup feature gives you alternate ways to lookup items when you don't have a scanner or a SKU to enter.

Options ID 5430 set to 'M' enables this function.

This allows you to enter the 'Manufacturer's Part Number' to post your item.

You can also enter the Universal Product Code or UPC or enter the associated Serial number.

If the SKU, Manufacturer Part Number, UPC or Serial Number are not available you can still easily locate your item using its Description from Inventory Maintenance.

In this example, our customer has handed us a flashlight with no bin tag or UPC code.

Place your cursor in the 'Description' field.

Type 'FLASH' and press Enter.

The Inventory Viewer displays a list of items that contain 'Flash' in the Description.

Click the arrows on the far right to scroll through the items.

When the list is long, as it is here, narrow the search by adding additional information in the 'Description' field and pressing Enter.

When you've located the item you are looking for, choose 'Select' to add the SKU to the Point of Sale Posting screen.

Then enter the Quantity and press Enter to post the item.

Here are some tips for using the Description Lookup.

Try to search with only one word. If you enter multiple words, the item you are looking for may not show up unless you enter the words exactly as they appear in the item's description.



Here's an example. When we type 'MOP-space-&-space-GLO', nothing displays.

But if I type MOP&GLO without spaces, I find my item.

You can also place an asterisk at the end of your word.

This will act as a 'wildcard' character and will broaden your search.

When we enter MOP with an asterisk, you can see how many more results appear.

QuickFind is like an online price book that can be set up on Eagle.

It provides another way to lookup items, such as PVC pipe or wire, that aren't normally tagged with SKUs or barcodes.

Review the Training on Demand course titled, [Setting Up QuickFind](#), to learn how to implement this function.

Once QuickFind has been set up, just click the button on the toolbar here [to begin](#).

First, select the item's category, in this case 'Soils'.

Choose the Subcategory, 'Potting Soil'.

Clicking the SKU brings the information to the posting screen where you can enter the Quantity and post the item.

As we have seen, Eagle's Point of Sale gives you several powerful, yet easy, ways to lookup and see merchandise.

Barcode Scanning is the easiest method but you can manually enter various numbers, descriptions or identifiers to locate items. And for those types of product that do not lend themselves to bin tagging, be sure to create and use the Quick Find grid.

Allowing your cashiers multiple methods to lookup items, keeps your line moving and your customers happy.